2-Step Verification Overview

Last Modified on 01/23/2024 2:20 pm EST

This feature is currently in beta testing and is only enabled for certain centers. Please contact your Account Manager to have 2-Step Verification added to your account.

What is 2-Step Verification?

2-Step Verification adds a layer of security to your account by requiring at least 2 methods of authentication. The first authentication method is a password, the second is typically a phone number or email address.

Both Provider and Connect Portal users have the option to set up Verified Methods when enabling 2-Step Verification. These methods can be an authenticator app, a mobile phone number or an email address.

With 2-Step Verification, all users, in both our Provider and Connect Portals, can optionally set up what are called verified methods. These can be an authenticator app, a mobile phone number or an email address.

- Connect Portal: How parents set up and enable 2-Step Verification
- Provider Portal: How staff sets up and enables 2-Step Verification

In this article, you will find:

- Which staff permissions must be set
- Requiring 2-Step Verification
- How to reset a 2-Step Verification account for Staff
- How to reset a 2-Step Verification account for Parents
- How to reset a 2-Step Verification account for Contacts

Staff Permissions

The following Activity IDs must be set to 'All Permissions'

- Activity ID 1068 For staff to enable and utilize 2-Step Verification for their account
- Activity ID 1876 To allow a staff member to reset another staff member's 2-Step Verification account
- Activity ID 1875 To allow a staff member to reset a parent/guardian's 2-Step Verification account
- Activity ID 1877 To allow a staff member to reset a contact's 2-Step Verification account

Requiring 2-Step Verification

Business and center levels can require all Provider Portal and/or all Connect Portal users to use 2-Step Verification. Once 2-Step Verification is required at the business level, it will automatically be required at all centers under that business level.

Please Note: If 2-Step Verification has been required at the business level, center-level users cannot change the setting.

Once required, users will have three opportunities to dismiss the setup, once all three attempts have been dismissed, they are required to add at least one verified method.

To require 2-Step Verification, a user must have 'All Permissions' set to the following:

- Activity ID 1880 To require all Connect Portal users to use 2-Step Verification
- Activity ID 1879 To require all Provider Portal users to use 2-Step Verification

Requiring 2-Step on the Provider Portal

To make 2-Step Verification required for all Provider Portal users, follow the steps below:

- 1. Navigate to Setup > System Config and select Extended.
- 2. Locate the Security section.
- 3. The 'Admin/Staff: Require 2-Step Verification during log in' should be set to Yes.

Security	
Parent Portal: Auto expire login password (in days)	180
Provider: Auto expire login password	No 🗸
Important: User passwords will expire upon saving if they have not changed their password	within the specified number of days entered abo
Parent Portal: Require 2-Step Verification during log in 🔞	No 🗸
Admin/Staff: Require 2-Step Verification during log in 🔞	Yes 🗸

Requiring 2-Step on Connect Portal

To make 2-Step Verification required for all Connect Portal users, follow the steps below:

- 1. Navigate to Setup > System Config and select Extended.
- 2. Locate the Security section.
- 3. The 'Parent Portal: Require 2-Step Verification during log in' should be set to Yes.

Security		
Parent Portal: Auto expire login password (in days)	180	
Provider: Auto expire login password	No 🗸	
Important: User passwords will expire upon saving if they have not changed their password	within the sp	ecified number of days entered abo
Parent Portal: Require 2-Step Verification during log in 🔞	No 🗸	
Admin/Staff: Require 2-Step Verification during log in 🔞	Yes 🗸	

Resetting 2-Step Verification for Staff (Provider Portal)

If a staff member is unable to access their Verified Methods (email address, phone number or authenticator app) and log in to the Provider Portal, their 2-Step Verification account can be reset by another staff member. Resetting a 2-Step Verification account will remove all their Verified Methods. Once reset, they can log in and add the correct methods.

Important: In order for a staff member to have access to reset another staff member's 2-Step Verification account, they must have Activity ID 1876 set to 'All Permissions'.

- Search.. Business Level - DCW - Transactional 0 Home Family Payments Attendance Lessons Meals Connect Approvals Reports Staff Setup Q Semester Home Information Classroom Billing Period: 01/01/2023 to 12/31/2023 Classroom Summary Classroom List 6 31 Rates Center Classroo Semester Fees DCW Transactional- CENTER 1 AM Car Childcare 2021 Vacation DCW Transactional- CENTER 1 Enrichm Childcare 2021 1 2 DCW Transactional- CENTER 1 Football March 2023 Third Party ⇔ DCW Transactional- CENTER 1 Infants 2019-2020 Early Childho Schedule Birthday Billing DCW Transactional- CENTER 1 Music Re Childcare 2021 PM Care DCW Transactional- CENTER 1 Bus Childcare 2021 DCW Transactional- CENTER 2 Childcare 2021 1 Enrichme 0 282 Health Checklist Registratio New Famil Daily InSite 8 0 <u>_</u> Admins System Config Live Ratios Records from 1 to 7 Ľ bage 👻
- 1. Click Setup, then Admins.

2. Locate the staff member in the Admin List and click the pencil icon to the left of their name.

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☆	Home	Family Payments	Attendance Lessons	Meals Connect Ap	provals Reports Staff S	Setup Q		
Setup	-> Admins							
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3. Under the password reset section, click **Reset All Verification Methods**.

Email:	
Password requirem	ents:
 Password length mu Password must not Password must com At least one i At least one i At least one i At least one i 	ist be between 12 and 32 characters contain the user name cain at least three of the following element: uppercase letter owercase letter number special character
* Password:	•••••••••••••••••••••••••••••••••••••••
* Confirm Password:	· · · · · · · · · · · · · · · · · · ·
2-Step Verification	Reset All Verification Methods
SAVE	

4. Click Yes, Reset to confirm the reset.

Reset 2-Step Verification	×
Do you wish to reset 2-step Verification for bbeauty an delete all verified methods?	nd
Yes, Rese	ŧ

Resetting 2-Step Verification for Families (Connect Portal)

If a user is unable to access their Verified Methods (email address, phone number or authenticator app) and log in to the Connect Portal, their 2-Step Verification account can be reset by a staff member. Resetting a 2-Step Verification account will remove all their Verified Methods. Once reset, they can log in and add the correct methods.

Important: In order for a staff member to have access to reset a parent/guardian's 2-Step Verification account, they must have Activity ID 1875 set to 'All Permissions'.

- 1. Navigate to the family record and click the **Parents** tab.
- 2. Locate the Connect Information section. Click Actions, then Reset 2-Step Verification.

Connect Information		
Connect ID BilboBaggins	Actions -	Password requirements:
Password Q Confirm Password Q	Inactivate Update Reset 2-Step Verification	Password requirements: Password must be between 12 and 32 characters Password must not contain the user name Password must contain at least three of the following elements: At least one uppercase letter At least one lowercase letter At least one special character

3. Then click **OK** to confirm the reset.

Reset 2-S	tep Verification
Reset 2-Step Verific delete all v	ation for Baggins bob and erified methods?
ОК	CANCEL 5:
	Password length must be l

Resetting 2-Step Verification for Contacts (Connect Portal)

If a contact is unable to access their Verified Methods (email address, phone number or authenticator app) and log in to the Connect Portal, their 2-Step Verification account can be reset by a staff member. Resetting a 2-Step Verification account will remove all their Verified Methods. Once reset, they can log in and add the correct methods.

Important: In order for a staff member to have access to reset a contact's 2-Step Verification account, they must have Activity ID 1877 set to 'All Permissions'.

- 1. Navigate to the family record and click the **Children** tab.
- 2. Then click the More tab and select Contacts.

Summary	Family	Children	Parents	Third Party	Volunteers	Communication	Auto-Pay	Vacation	Financials	Receipts	Merge
Y	Ca Mille Age	I rson er 9 쌆		Ste Miller Age 8	ven #	Sti Mil Age	ephanie ^{er} 5 <u>₩</u>	2			
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3. Locate the Payer Information section and click Reset 2-Step Verification.

4. Then click **Yes, Reset** to confirm the reset.

Reset 2-Step Verification	×
Do you wish to reset 2-Step Verification for Billy Denver and delete all verified methods? No Yes, Reset	2